uniFLOW Capture

# uniFLOW Capture V5.3 SR6

## Installation Guide

NTware

# Disclaimer

All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - without the prior written permission of NT-WARE Systemprogrammierungs-GmbH (hereinafter also referred to as NT-ware).

Company and product names mentioned herein are registered or unregistered trademarks of their respective companies. Mention of third-party products is for information purposes only and constitutes neither an endorsement nor a recommendation. NT-ware assumes no responsibility with regard to the performance or use of these products. Also, NT-ware makes no claim to these trademarks. Any use of trademarks, logo, service marks, trade names, and product names is prohibited without the written permission of the respective owners.

Adlib, Express and Express Server are either registered trademarks or trademarks of Adlib Publishing Systems Inc.; Adobe®, Adobe® Reader, Acrobat®, Distiller®, PostScript® and products of the CREATIVE SUITE(S) are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries; Apple®, the Apple® logo, Mac®, Mac OS®, Macintosh®, iPhone®, iPad® and AirPrint® are trademarks of Apple Inc. registered in the U.S. and other countries; Box of Box Inc.; Blackboard Transact™ of Blackboard Inc.; CANON, imageRUNNER, imageRUNNER ADVANCE, MEAP, CPCA, AMS, iW AMS, iW Desktop, iSend, iW SAM are trademarks or registered trademarks of Canon Inc.; CBORD CS Gold® of the CBORD Group Inc.; Crystal Reports and other Business Objects products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of Business Objects Software Ltd. Business Objects is an SAP company; Dropbox of Dropbox Inc.; eCopy™, eCopy® ShareScan®, and eCopy® ScanStation® are marks or trademarks of Nuance Communications, Inc.; Evernote® of Evernote Corporation; FileNet® of IBM Corporation; Foxit®SDK and Foxit® Reader of Foxit Corporation; Google Docs of Google Inc.; Google Cloud Print™ web printing service is a trademark of Google Inc.; Helix™ Production Workflow is a trademark of NT-WARE Systemprogrammierungs-GmbH; HP, HEWLETT-PACKARD, PCL and LASERJET are registered trademarks that belong to Hewlett-Packard Development Company; KONICA MINOLTA is a registered trademark of KONICA MINOLTA Inc.; iOS® of Cisco Technology Inc.; iDRS™ SDK and IRISConnect™ are unregistered trademarks of I.R.I.S. Group S.A.; JAWS pdf courier™ are trademarks of Global Graphics SA.; Microsoft®, Windows®, Windows Vista®, Windows 7®, Internet Explorer®, Internet Information Services, Microsoft® Word, Microsoft® Excel, OneDrive, SQL Server® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries of Microsoft Corporation; Neevia Document Converter Pro™ of Neevia Technology; NetWare, Novell®, Novell eDirectory® of Novell Inc. are registered trademark of Novell Inc. in the United States and other countries; MobileIron® of Mobile Iron Inc., Océ and PRISMA are trademarks or registered trademarks of Océ Holding B.V., OpenOffice.org™ of Orade Corporation; PAS™ is a trademark of Equitrac Corp.; PosterJet is copyrighted and an internationally registered trademark of Eisfeld Datentechnik GmbH & Co. KG; RedTitan EscapeE of RedTitan Limited; NETAPHOR®, SiteAudit™ are trademarks of NETAPHOR SOFTWARE Inc.; SAMSUNG is a trademark of SAMSUNG in the United States or other countries; Therefore™ of Therefore; UNIX® is a registered trademark of The Open Group; uniFLOW®, uniFLOW Serverless Secure Printing®, Helix Production Workflow®, MIND®, microMIND®, and MiCard® are registered trademarks of NT-WARE Systemprogrammierungs-GmbH; pcProx®, AIR ID® are registered trademarks of RFIdeas Inc.Readers; CASI-RUSCO® is a registered trademark of ID Card Group; Radio Key® is a registered trademark of Secura Key; GProx™ II is an unregistered trademark of Guardall; HID® ProxHID is a registered trademark of HID Global Corporation; Indala® is a registered trademark of Motorola; ioProx™ is an unregistered

trademark of Kantech; Xerox, Xerox and Design, as well as Fuji Xerox and Design are registered trademarks or trademarks of Xerox Corporation in Japan and/or other countries.

All other trademarks, trade names, product names, service marks are property of their respective owners and are hereby acknowledged.

While every precaution has been taken in the preparation of this document, NT-ware assumes no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. NT-ware does not assume any responsibility or liability for any malfunctions or loss of data caused by the combination of at least one NT-ware product and the used operation system and/or third-party products. In no event shall NT-ware be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

In addition, this manual provides links to the sites of affiliated or independent companies and certain other businesses. NT-ware is not responsible for examining or evaluating, and NT-ware does not warrant the offerings of, any of these businesses or individuals or the content of their websites. NT-ware does not assume any responsibility or liability for the actions, product, and content of all these and any other third parties. You should carefully review their privacy statements and other conditions of use.

Tuesday, September 01, 2015, Bad Iburg (Germany)

### Important Note

**Serious problems might occur if you modify the registry of your Windows operating system incorrectly. These problems might require that you reinstall the operating system. We strongly recommend to always back up the registry of your Windows operating system before applying changes to it, just in case you do something wrong. NT-ware does not assume any responsibility or liability for any impact on the operating system after changing the registry. You understand and accept that you use this information and modify the registry of your Windows operating system at your own risk.**

### Copyright and Contact

NT-WARE Systemprogrammierungs-GmbH
Niedersachsenstraße 6
49186 Bad Iburg
Germany

www.nt-ware.com

Should you come across any relevant errors or have any suggestions please contact documentation@nt-ware.com or use the ***Send feedback here*** button of the uniFLOW Online Help.

© 1998-2015 NT-WARE Systemprogrammierungs-GmbH.

# Symbols

### Text Styles

***This style is used for text that is displayed on screen.***

*This style is used for text the user has to type in.*

This style is used for hyperlinks to web pages, internal links to other pages in this manual.

`This style is used for code examples: XML code, variables or regular expressions.`

### Pictograms

Important Note:
Information that is crucial for the correct functioning of the uniFLOW software.

External Manual:
Pointer to additional manuals for third party hardware or third party software.

Region Specific Feature:
Indicator for uniFLOW features that are not available worldwide.

External Link:
Link to an external web page.

Settings:
Detailed explanation of configuration settings or operational procedures.

Compass:
Path to the menu or configuration page in the software.

### Screenshots and Diagrams

This manual contains screenshots of the software, diagrams explaining relations and pictures of products. Even though all visuals are up-to-date at the time of writing, they are subject to change.

### Send Feedback

Should you come across any relevant errors or have any suggestions please contact documentation@nt-ware.com or use the ***Send feedback here*** button of the uniFLOW Online Help.

# Contents


1 Preparation ..... 1

1.1 Information Required from the Customer ..... 2

1.2 Before You Start ..... 5

2 System Requirements ..... 7

2.1 Operating Systems ..... 8

2.2 Hardware ..... 10

3 Installation ..... 11

3.1 uniFLOW Installation ..... 12

3.2 MEAP Applet Installation ..... 14

4 Configuration ..... 15

4.1 Activation ..... 16

4.2 User Configuration ..... 20

4.3 Email Server Configuration ..... 23

4.4 General Settings Configuration ..... 24

4.5 Price Profiles Configuration ..... 25

4.6 Scan Processing Server Installation ..... 26

4.7 Scan Device Creation ..... 27

4.8 Behavior for MEAP Applications ..... 28

4.9 Scan Workflow Configuration ..... 29

4.9.1 Multiple Scan Destinations ..... 29

4.9.2 Scan to Box ..... 30

4.9.3 Scan to Dropbox ..... 30

4.9.4 Scan to Email ..... 31

4.9.5 Scan to Evernote ..... 31

4.9.6 Scan to Folder ..... 31

4.9.7 Scan to FTP ..... 32

4.9.8 Scan to Google Drive ..... 32

4.9.9 Scan to OneDrive ..... 33

4.9.10 Scan to SharePoint ..... 33

4.9.11 Scan to WebDAV ..... 34

4.9.12 Scan to Myself ..... 34

5 Index ..... 37

# Preparation

# 1

# 1.1 Information Required from the Customer

**Table 1: Customer network configuration**

(To be completed **before** installation)

| | **Device IP Addresses** | |
|---|---|---|
| 1.1 | IP address of Canon MFP 1 | |
| 1.2 | IP address of Canon MFP 2 | |
| 1.3 | IP address of Canon MFP 3 | |
| 1.4 | IP address of Canon MFP 4 | |
| 1.5 | IP address of Canon MFP 5 | |
| 1.6 | IP address of Canon MFP 6 | |
| 1.7 | (add other IP addresses/serial numbers as required) | |
| | **LDAP Information** | |
| 2.1 | LDAP Server name | |
| 2.2 | Username of user with LDAP access | |
| 2.3 | Password of user with LDAP access | |
| 2.4 | Name of LDAP OU storing user details | |
| | **SMTP Server Information** | |
| 3.1 | uniFLOW Sender email address | |
| 3.2 | SMTP Server address | |
| 3.3 | Does SMTP Server require authentication? | Yes/No:<br>Type: |
| 3.4 | SMTP Authentication Server (if required) | |
| 3.5 | SMTP Authentication Account (if required) | |
| 3.6 | SMTP Authentication Password (if required) | |
| | **General** | |
| 4.1 | Required Maximum age of print jobs (hours) | |

**Table 2: Device Asset Information**

(To be completed **during** installation)

| | **Device IP Addresses** | |
|---|---|---|
| 1.1 | Unique asset number of Canon MFP 1 | |
| 1.2 | Unique asset number of Canon MFP 2 | |
| 1.3 | Unique asset number of Canon MFP 3 | |

| | | |
|---|---|---|
| 1.4 | Unique asset number of Canon MFP 4 | |
| 1.5 | Unique asset number of Canon MFP 5 | |
| 1.6 | Unique asset number of Canon MFP 6 | |
| 1.7 | (add further unique asset numbers, as required) | |

### Table 3: Scan Destination Information

(To be completed **before** installation)

| | **Scan Destinations** | |
|---|---|---|
| 1.1 | Multiple Scan Destinations | Yes/No: |
| 1.2 | Scan to Box | Yes/No: |
| 1.3 | Scan to Dropbox | Yes/No: |
| 1.4 | Scan to Email | Yes/No: |
| 1.5 | Scan to Evernote | Yes/No: |
| 1.6 | Scan to Folder | Yes/No: |
| 1.7 | Scan to FTP | Yes/No: |
| 1.8 | Scan to Google Drive | Yes/No: |
| 1.9 | Scan to OneDrive | Yes/No: |
| 1.10 | Scan to SharePoint | Yes/No: |
| 1.11 | Scan to WebDAV | Yes/No: |
| 1.12 | Scan to Myself | Yes/No: |
| | **Scan to Box** | |
| 2.1 | Send an Email on Error | Yes/No: |
| | **Scan to Dropbox** | |
| 3.1 | Send an Email on Error | Yes/No: |
| | **Scan to Evernote** | |
| 4.1 | Send an Email on Error | Yes/No: |
| | **Scan to Folder** | |
| 5.1 | Scan to User's Home Folder | Yes/No: |
| 5.2 | Path to Base Folder (if required) | |
| | **Scan to FTP** | |
| 6.1 | FTP Server address | |
| 6.2 | Base Folder | |
| 6.3 | Allow unencrypted communication | Yes/No: |
| 6.4 | Allow self-signed SSL certificates | Yes/No: |
| 6.5 | FTP authentication method? | |
| 6.6 | FTP User (if required) | |

| | | |
|---|---|---|
| 6.7 | FTP Password (if required) | |
| 6.8 | Identity Type (if required) | |
| | **Scan to Google Drive** | |
| 7.1 | Send an Email on Error | Yes/No: |
| | **Scan to OneDrive** | |
| 8.1 | Send an Email on Error | Yes/No: |
| | **Scan to SharePoint** | |
| 9.1 | SharePoint Server Address | |
| 9.2 | Protocol | HTTP / HTTPS: |
| 9.3 | Allow self-signed SSL certificates | Yes/No: |
| 9.4 | Show SharePoint Site | Yes/No: |
| 9.5 | SharePoint Service Account (if required) | |
| 9.6 | Email notification on error | Yes/No: |
| | **Scan to WebDAV** | |
| 10.1 | WebDAV Server IP or DNS Name | |
| 10.2 | WebDAV URL | |
| 10.3 | Allow user folder navigation | Yes/No: |
| 10.4 | Protocol | HTTP / HTTPS: |
| 10.5 | Get User Authentication | |
| 10.6 | Identity type to browse folders (if required) | |
| 10.7 | Identity type to send file (if required) | |

## 1.2 Before You Start

Before beginning with the installation, please ensure that you make the following preparations:

- Obtain the latest uniFLOW *mom.exe* file.
- Make sure that IIS is installed on the server.
- Optional: Having a prepared Price Profile File (CSV) available.
- The information on the first page has to be completed by the IT manager of the company.

### Anti-Virus Software

Configure the anti-virus software that is installed on the uniFLOW server, so that it does not scan the folders listed below. We recommend to disable **on access scanning** on these folders and enable a **scheduled scan** during the night instead.

**uniFLOW**

- uniFLOW installation folder:
  *%ProgramFiles(x86)%\uniFLOW*
- uniFLOW installation folder:
  *%CommonProgramFiles(x86)%\NT-ware Shared*
- Windows spool folder:
  *%SYSTEMROOT%\System32\spool*
- SQL Server data folder:
  *user defined*

**RPS**

- RPS installation folder:
  *%ProgramFiles(x86)%\uniFLOW Remote Print Server*
- Windows spool folder:
  *%SYSTEMROOT%\System32\spool*

# System Requirements

# 2

# 2.1 Operating Systems

### Client Operating System Support

- Installations of the uniFLOW server system on client operating systems are supported (since uniFLOW V5.3 with Windows 7 or higher).
  However, there are a few limitations which need to be considered. Please refer to the *White Paper - Software Compatibility List for NT-ware Products*, to be found in the NT-ware Knowledgebase.
  This white paper explains supported features and known limitations of uniFLOW on a client operating system in detail. Read this white paper before you plan to install uniFLOW on a client operating system.

### uniFLOW and RPS

- uniFLOW and the Remote Print Servers (RPS) have to be installed on dedicated systems.

### Domain Controller and Microsoft Exchange Server

- Installations on Active Directory Domain Controllers (DC), and Microsoft Exchange Servers are not supported.

### Microsoft Small Business Server

Installations on Microsoft Small Business Servers (SBS) are supported, but not by default. For that reason, please refer to the white paper *Installing uniFLOW on a Microsoft Windows Small Business Server* in the NT-ware Knowledgebase.

### Windows Server 2003

- Internet Information Services (IIS) 6.0 or higher
- Internet Explorer 6 or higher required (Internet Explorer 7 or higher recommended).

### Windows Server 2008

- Standard installation with a graphical user interface
- Internet Information Services (IIS) 7.0 (prepared for a uniFLOW installation)
- Internet Explorer 7 or higher recommended

### Windows Server 2008 R2

- Standard installation with a graphical user interface
- Internet Information Services (IIS) 7.5 (prepared for a uniFLOW installation)
- Internet Explorer 8 or higher recommended

### Windows Server 2012

- Standard installation with a graphical user interface
- Internet Information Services (IIS) 8 (prepared for a uniFLOW installation)
- Internet Explorer 10 or higher recommended

### Windows Server 2012 R2

- Standard installation with a graphical user interface
- Internet Information Services (IIS) 8.5 (prepared for a uniFLOW installation)
- Internet Explorer 11 or higher recommended

uniFLOW is supported on a Microsoft Windows Server 2012 since uniFLOW V5.2 SR1.

## 2.2 Hardware

This topic describes the minimum recommended hardware requirements for the uniFLOW server and the RPS.

Actual requirements will vary based on your system configuration and the applications and features you choose to install.

### Minimum Hardware Requirements

- CPU
  - Systems with a Single Core CPU – x86/x64 with a 2.5 GHz minimum clock speed.
- RAM
  - 4 GB
- Hard Disk Drive
  - Minimum of 50 GB of free disk space.

### Recommended Hardware Requirements

- CPU
  - Systems with a Multi Core CPU – x86/x64 with a 1.5 GHz minimum clock speed.
  - Systems with Multiple Physical CPUs – x86/x64 with a 1.5 GHz minimum clock speed.
- RAM
  - 4 GB
- Hard Disk Drive
  - Minimum of 80 GB of free disk space.

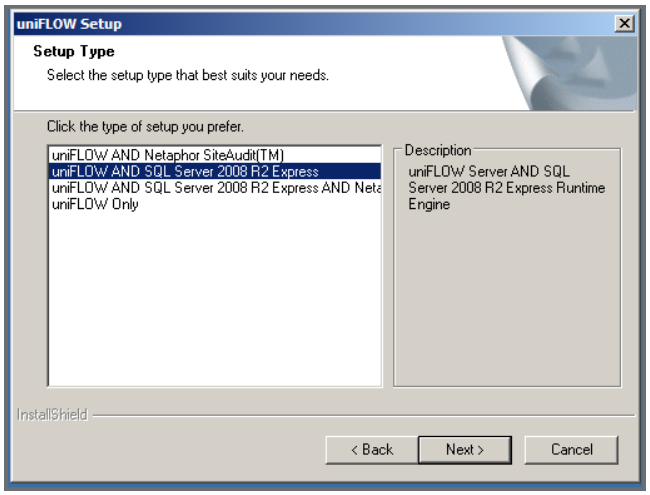
# Installation

# 3

# 3.1 uniFLOW Installation

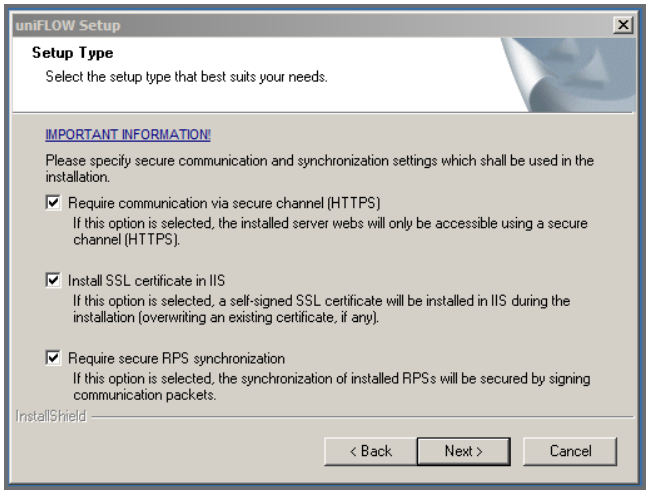
*Time to complete tasks: 45 minutes*

1. Double-click on the file *mom.exe* to start the installer.
2. Select a language and click ***Next.***
3. If prompted to install ***Microsoft Visual C++ 2008 SP1 Redistributable Package***, click ***Install.***
4. Install Microsoft .NET Framework (if prompted) and click ***Next.***
5. In the ***Welcome to InstallShield for uniFLOW*** window, click ***Next.***
6. Select the according region and click ***Next.***
7. Click ***Yes*** to accept the License Agreement.
8. On a 64-bit system, there is a prompt to set IIS to run in 32-bit mode. If there are existing 64-bit applications running on IIS, this could cause them to break so the customer will need to confirm that this is OK. Select ***Yes*** to continue.
9. A web page will appear. Make sure that all steps mentioned in the web page are completed before continuing.
10. *In the* ***Choose Destination Location*** window, unless told otherwise by the IT department, click ***Next***.
11. For the ***Setup Type***, select ***uniFLOW AND SQL2008 R2 Express*** and click ***Next.***


uniFLOW Setup
Setup Type
Select the setup type that best suits your needs.
Click the type of setup you prefer.
uniFLOW AND Netaphor SiteAudit(TM)
uniFLOW AND SQL Server 2008 R2 Express
uniFLOW AND SQL Server 2008 R2 Express AND Neta
uniFLOW Only
Description
uniFLOW Server AND SQL Server 2008 R2 Express Runtime Engine
InstallShield
< Back
Next >
Cancel

12. For the ***Database destination***, unless told otherwise by the IT department, accept the default and click ***Next.***
13. For the ***Select Program Folder*** window, accept the default ***uniFLOW*** and click ***Next.***

14. An ***Important Information*** screen appears with 3 options about security (SSL and HTTPS). All three should be selected (default). Click ***Next*** to continue.


uniFLOW Setup
Setup Type
Select the setup type that best suits your needs.
IMPORTANT INFORMATION!
Please specify secure communication and synchronization settings which shall be used in the installation.
Require communication via secure channel (HTTPS)
If this option is selected, the installed server webs will only be accessible using a secure channel (HTTPS).
Install SSL certificate in IIS
If this option is selected, a self-signed SSL certificate will be installed in IIS during the installation (overwriting an existing certificate, if any).
Require secure RPS synchronization
If this option is selected, the synchronization of installed RPSs will be secured by signing communication packets.
InstallShield
< Back
Next >
Cancel

15. Leave the default setting for ***Enforce HTTPS for the internal HTTP server*** and click ***Next.***
16. The setup will then start to copy files and SQL Server 2008 R2 Express. The screen may flash and different windows installing files may appear.
17. After SQL 2008 R2 Express has been installed, it is necessary to reboot the server. Click ***Next*** to exit the installer.
18. Accept ***Yes, I want to restart my computer now*** and click ***Finish.***
19. Once the server has restarted, and a user logs on, the installer will continue.
20. A window will appear stating that a Snapshot of the installation is taking place.
21. Once the installation is complete, a web page will appear with some "Read-Me" instructions. Ensure these actions are completed, especially the settings for "Secure Printing with MEAP…." and "To avoid problems with locally generated spoolfile copies…".

## 3.2 MEAP Applet Installation

- Install the uniFLOW MEAP Client on each Canon device and ensure that it is "started". The install files can be found in ***Connections > Agents/Terminals > MEAP & miniMIND > Resources.***
- Install Universal Login manager on each MFP. In the "enhanced system options", select the Universal Login Manager as the default login method and restart each device. The install files can be found in ***Connections > Agents/Terminals > MEAP & miniMIND > Resources.***

# Configuration

# 4

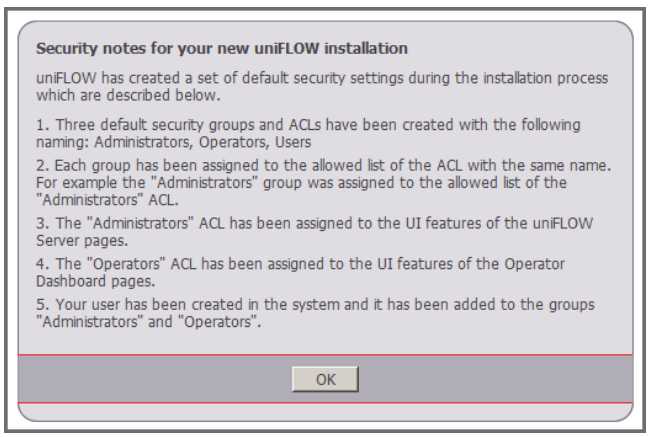
# 4.1 Activation

*Time to complete tasks: 15 minutes*

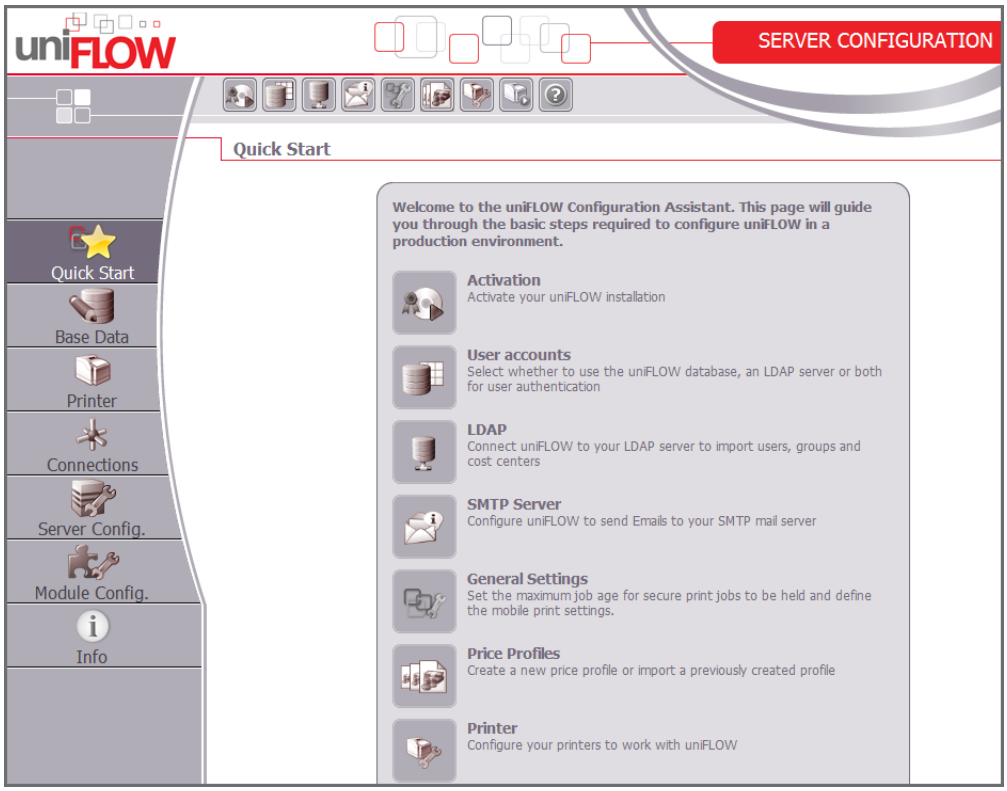
1. Launch the uniFLOW server configuration screen either by double-clicking the icon on the desktop or launching Internet Explorer and typing the address https://localhost/pwserver (see: https://localhost/pwserver - https://localhost/pwserver).
2. A warning message will appear stating that there is a problem with the website's security certificate. This is normal as HTTPS security is used to secure the uniFLOW Server. Click on the ***Continue to this website (not recommended)*** option. To remove this warning in the future, follow the instructions in the uniFLOW User Manual here: http://www.nt-ware.com/mom/5.3/HTML/EN/index.htm#21721.htm (http://www.nt-ware.com/mom/5.3/HTML/EN/index.htm#21721.htm)

Certificate Error: Navigation Blocked - Windows Internet Explorer
http://localhost/pwserver
Certificate Error: Navigation ...
There is a problem with this website's security certificate.
The security certificate presented by this website was not issued by a trusted certificate authority.
Security certificate problems may indicate an attempt to fool you or intercept any data you send to the server.
We recommend that you close this webpage and do not continue to this website.
Click here to close this webpage.
Continue to this website (not recommended).
More information

3. You will be prompted to log on to uniFLOW. Enter the username and password used to log onto the server.
4. A "security notes" page appears. Click on ***OK*** to close this screen. Only the username/password entered in the step above can access the uniFLOW server pages.

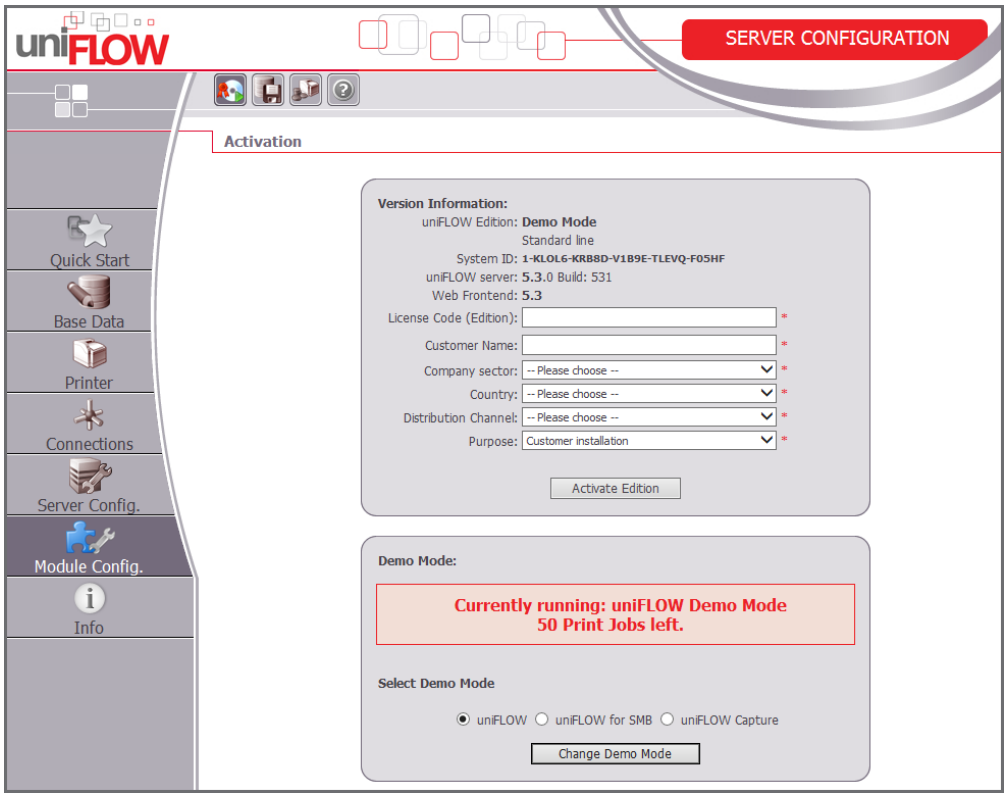

Security notes for your new uniFLOW installation
uniFLOW has created a set of default security settings during the installation process which are described below.
1. Three default security groups and ACLs have been created with the following naming: Administrators, Operators, Users
2. Each group has been assigned to the allowed list of the ACL with the same name. For example the "Administrators" group was assigned to the allowed list of the "Administrators" ACL.
3. The "Administrators" ACL has been assigned to the UI features of the uniFLOW Server pages.
4. The "Operators" ACL has been assigned to the UI features of the Operator Dashboard pages.
5. Your user has been created in the system and it has been added to the groups "Administrators" and "Operators".
OK

5. The uniFLOW Quick Start page appears. Click on the ***Activation*** button.

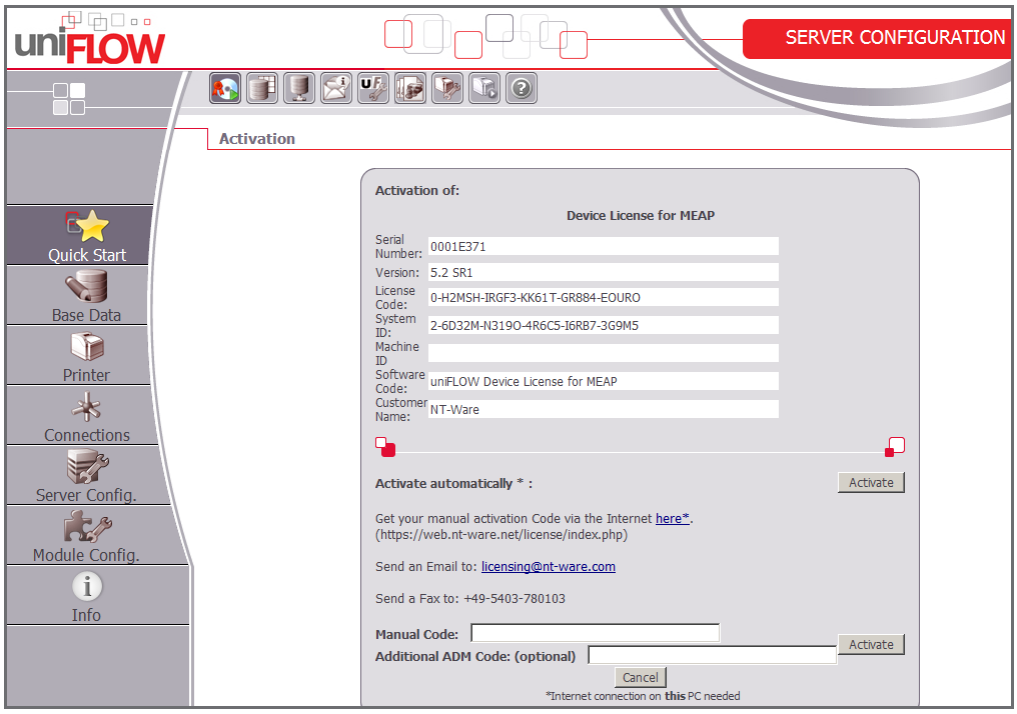

uniFLOW
SERVER CONFIGURATION
Quick Start
Base Data
Printer
Connections
Server Config.
Module Config.
Info
Quick Start
Welcome to the uniFLOW Configuration Assistant. This page will guide you through the basic steps required to configure uniFLOW in a production environment.
Activation
Activate your uniFLOW installation
User accounts
Select whether to use the uniFLOW database, an LDAP server or both for user authentication
LDAP
Connect uniFLOW to your LDAP server to import users, groups and cost centers
SMTP Server
Configure uniFLOW to send Emails to your SMTP mail server
General Settings
Set the maximum job age for secure print jobs to be held and define the mobile print settings.
Price Profiles
Create a new price profile or import a previously created profile
Printer
Configure your printers to work with uniFLOW

6. Enter the following information:
   a. In ***License Code (Edition)***, enter the uniFLOW license code. Each device will have its own license, so this process will need to be repeated (see point 11 below).
   b. In ***Customer Name***, enter the customer's name.
   c. In ***Company Sector***, select the market sector that best fits the customer.
   d. In ***Country***, select your country.
   e. In ***Distribution Channel***, select whether this installation is being made by the direct or partner channel. If you select either of these, enter the appropriate information in either the "Channel Name" or "Partner Name" field.

f. In ***Purpose***, select ***Customer Installation.***




7. Click on the ***Activate Edition*** button.
8. A license confirmation screen will appear. Confirm the information click the ***Activate*** button in the middle of the screen on the right hand side near ***Activate Automatically***.
9. NOTE: If the uniFLOW server is not connected to the internet, please read uniFLOW user manual to see how to manually activate the software: http://www.nt-ware.com/mom/5.3/HTML/EN/index.htm#13772.htm (http://www.nt-ware.com/mom/5.3/HTML/EN/index.htm#13772.htm).



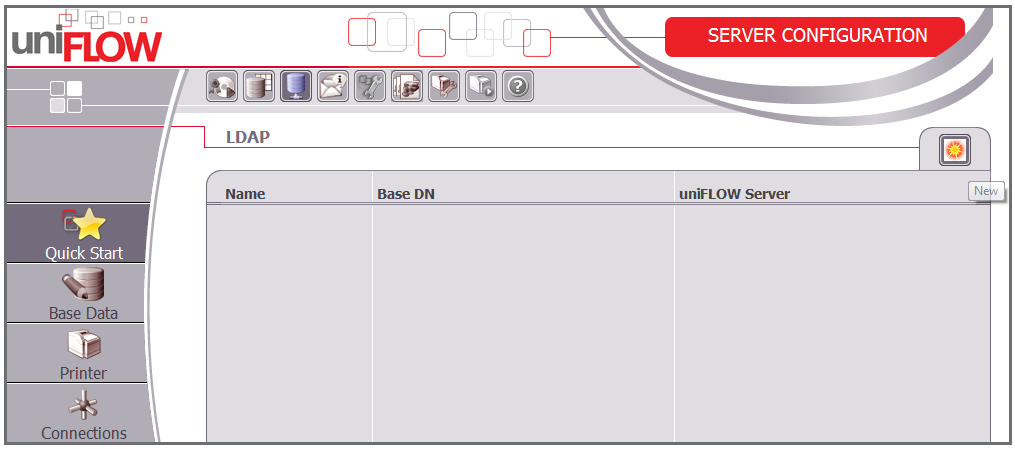
10. Once activated, the quick start page will appear. If it is required to see the activated licenses, click on the "info" button at the bottom left of the page.
11. For each additional uniFLOW license code, select ***Activation*** from the ***Quick Start*** page.
12. The activation screen is slightly different for an activated system. Enter the new license code in the ***License Check*** box and select the type of license (for example, "device license for MEAP" or "device license for CMFP".
13. Click ***Activate Module*** to activate the license.
14. Repeat steps 11 - 13 for each uniFLOW license code.

# 4.2 User Configuration

*Time to complete tasks: 30 minutes*

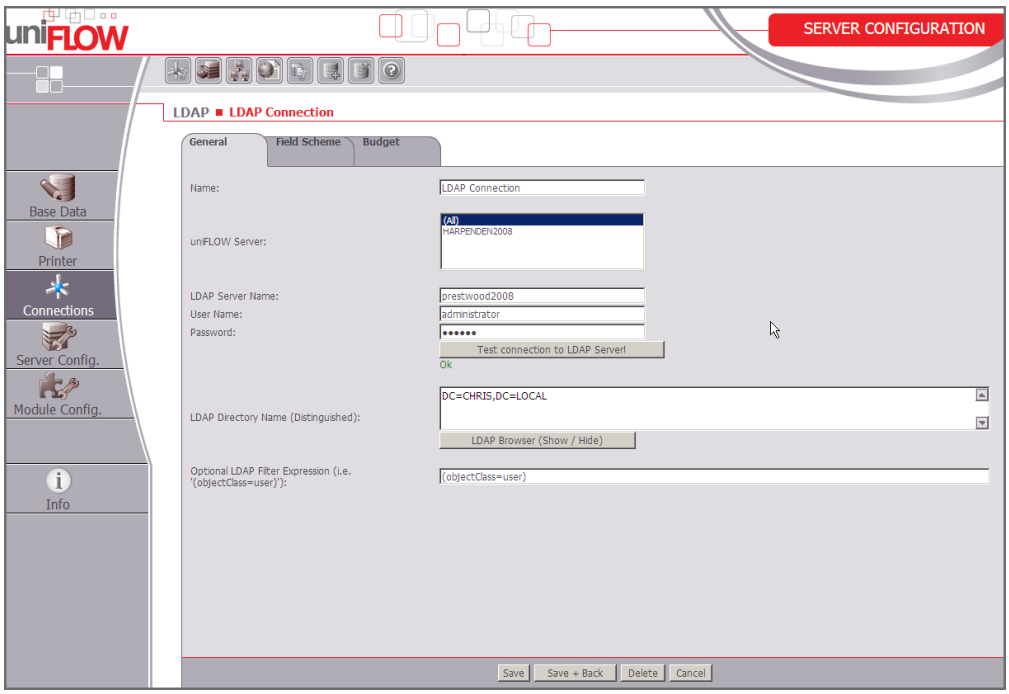
To ensure that users can print correctly, a connection to the company LDAP system is required.

1. From the ***Quick Start*** screen, select ***User accounts.***
2. Ensure ***uniFLOW Standard, Online LDAP Authentication*** is set.
3. Click ***Save*** and then click on the ***Quick Start*** menu option on the left hand side of the screen.
4. From the ***Quick Start*** Screen, select ***LDAP.***
5. Click on the ***New*** button on the top right hand side of the screen.

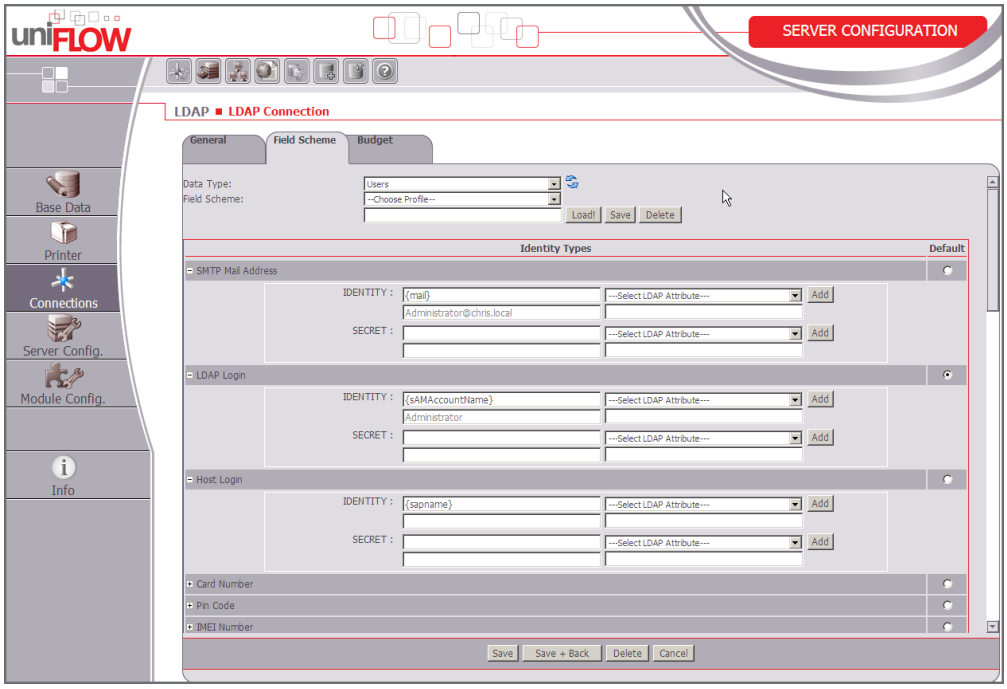



6. For the name, type *LDAP Connection.*
7. In the ***LDAP Server Name***, enter the name of the customers LDAP server. This will have been provided by the company IT department in **TABLE 1: 3.1 - LDAP Server Name.**
8. Enter the ***User Name*** and ***Password*** of a user that has access to the LDAP server. This will have been provided by the company IT department in **TABLE 1: 3.2 - Username of user with LDAP access** and **3.3 - Password of user with LDAP access.**

9. Click on ***Test connection to LDAP server!*** to confirm the settings. If the provided information is correct, a green ***OK*** is shown and the ***LDAP Directory Name*** and LDAP filter will be automatically completed.




10. If the users are stored in a different OU on the LDAP server, this information will have been provided by the company IT department in **TABLE 1: 3.4 - Name of LDAP OU storing user details.**
11. Click on the ***Field Scheme*** tab.
12. In the option ***Field Scheme***, select ***Active Directory*** and click ***Load!***




13. Some information will automatically be shown on the screen. This is to confirm that the correct fields in the customers LDAP directory are being mapped to the correct uniFLOW fields. Click ***Save + Back*** to save this information.

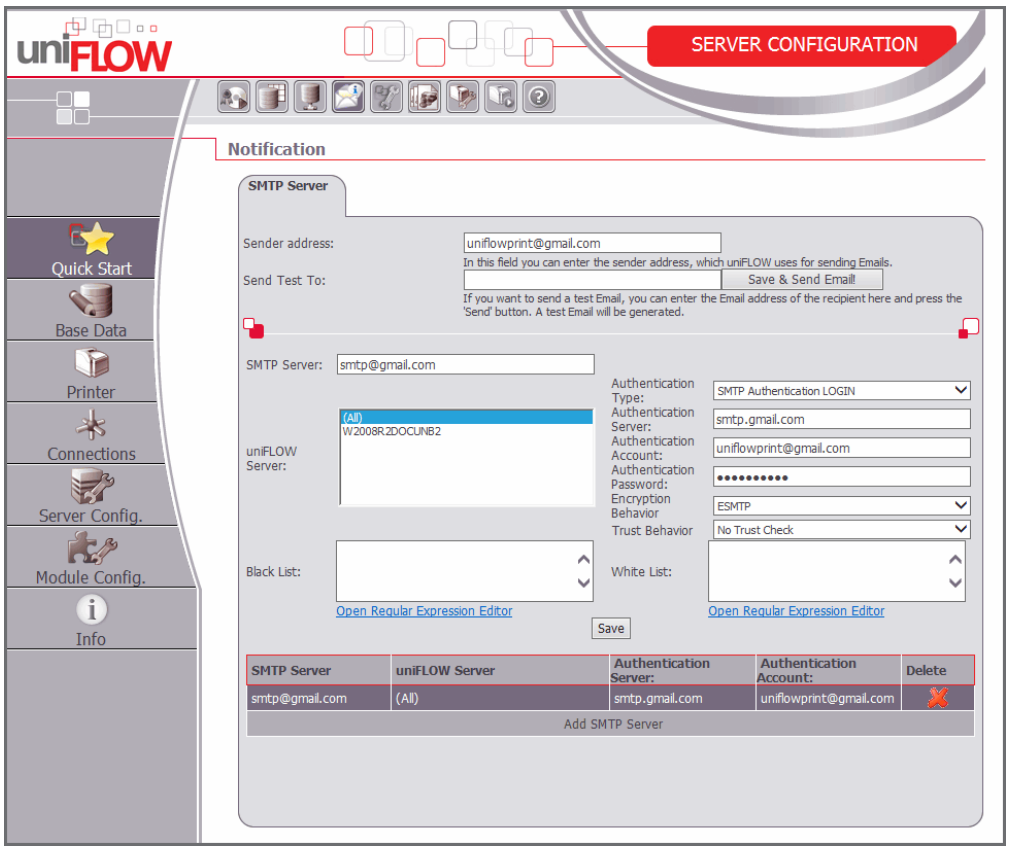
14. A "uniFLOW hint" window will appear. Click on the ***Save*** button to save the configuration.
15. Click on the ***Quick Start*** menu option on the left hand side of the screen.

# 4.3 Email Server Configuration

*Time to complete tasks: 15 minutes*

For uniFLOW to be able to send emails, an SMTP configuration is required.

1. From the ***Quick Start*** screen, select ***SMTP Server.***
2. In the ***Sender Address*** box, enter the email address provided by the company IT department in **TABLE 1: 4.1 - uniFLOW Sender email address.**
3. In the ***SMTP Server*** box, enter the name of the company SMTP server provided in **TABLE 1: 4.2 - SMTP Server Address.**
4. If the company SMTP server requires authentication (**TABLE 1: 4.3 - Does SMTP Server require authentication?**), enter the details under ***Authentication type***. If required, this information will have been provided by the company IT department in **TABLE 1: 4.4 - SMTP Authentication Server**, **4.5 - SMTP Authentication Account**, **4.6 - SMTP Authentication Password**.
5. Click ***Create*** to create the SMTP connector.
6. In the box ***Send Test To***, enter a valid customer email address and click ***Save & Send Email*** to confirm that the SMTP server connection is correct. The label ***Test email was successfully sent!*** should appear in green.




7. Click on the ***Quick Start*** menu option on the left hand side of the screen.

# 4.4 General Settings Configuration

*Time to complete tasks: 10 minutes*

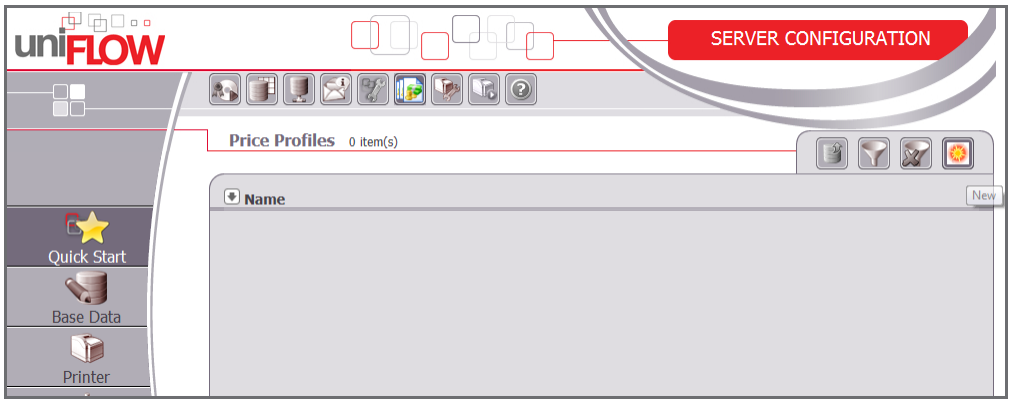
1. From the Quick Start screen, select ***General Settings.***
2. In the option for ***Print Jobs***, enter the ***Maximum age of print jobs (hours)***. The default setting is 10. This information will have been provided in **TABLE 1: 5.2 - Required Maximum age of print jobs (hours)**
3. Click on ***Save.***
4. Click on the ***Quick Start*** menu option on the left hand side of the screen.

# 4.5 Price Profiles Configuration

*Time to complete tasks: 10 minutes*

Price Profiles can be imported from a .csv file. The standard price profile has some example prices. These can be changed in a CSV editor (such as Microsoft Excel) to match the requirements of your customer before starting the installation. Prices can also be adjusted within uniFLOW, if required.

1. From the ***Quick Start*** screen, select ***Price Profiles.***
2. Click on the ***Import/Export*** button on the top right of the page. This is the first in the line of four buttons.




3. Click on ***Import*** and then click on the ***Browse*** button.
4. Select the file *Export_PriceProfile.csv* and click ***Open.***
5. Click ***Next.***
6. A confirmation screen will appear. Click ***OK. Import Data.***
7. When successful, click ***OK/Close.***
8. Click on the ***Quick Start*** menu option on the left hand side of the screen.

## 4.6 Scan Processing Server Installation

*Time to complete tasks: 10 minutes*

1. From the main uniFLOW screen, select ***Connections*** > ***Scan Proc. Server.***
2. On the ***Resources*** tab, click on ***Scan Processing Server*** to start the download of the installation package *MomSpaceSuit.exe.*
3. Double click on the file *MomSpaceSuite.exe* to start the installer.
4. Click ***Next*** on the welcome screen.
5. Click ***Yes*** to accept the License Agreement.
6. The window ***Choose Destination Location*** appears. Unless told otherwise by the IT department, click ***Next.***
7. Enter the ***HTTP Port and HTTPS Port***. Unless told otherwise by the IT department, click ***Next.***
8. Begin installation, click ***Install.***
9. After the installation, click ***Finish*** to exit the wizard.

# 4.7 Scan Device Creation

*Time to complete tasks: 5 minutes*

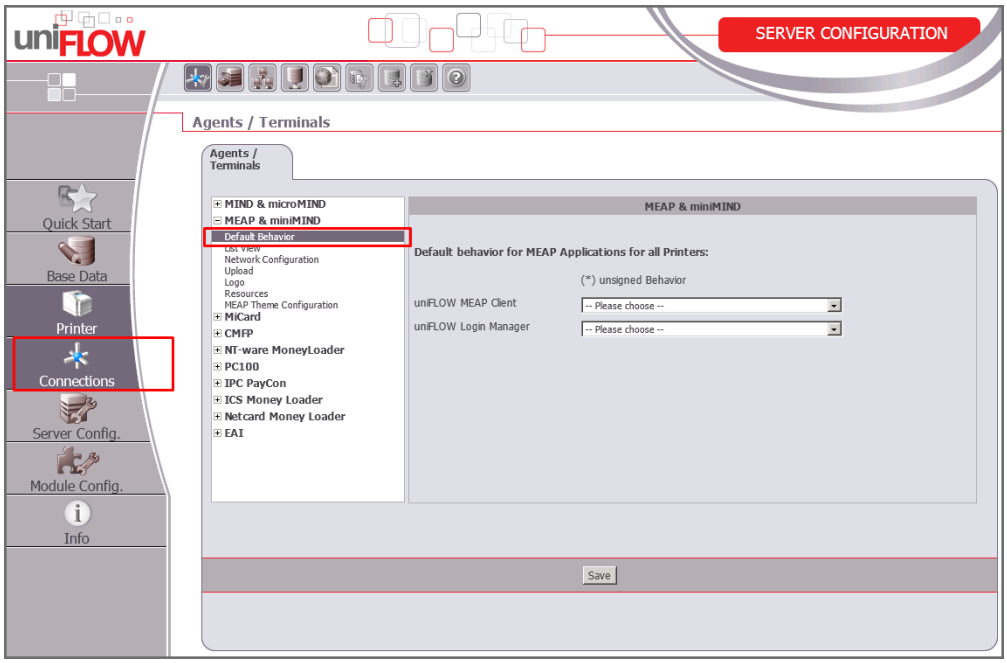
1. From the ***Quick Start*** screen, select ***Printer.***
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Single Printer*** and click ***New.***
4. From the list of wizards, select ***Scan Device*** and click ***Next.***
5. Leave ***Spooler Name*** at default (None); under ***Name***, choose a unique name for the scan device, then click ***Next.***
6. For ***Asset Information***, enter optional management or asset information and click ***Next.***
7. For the ***Device Configuration***, enter the ***IP/DNS Name*** and click ***Next.***
8. Click ***Finish + New*** and repeat the steps 4-7 for all scan devices.
9. On the ***Configuration overview*** for the last Scan Device check the box ***Continue with the Global Workflow Creation*** and click ***Finish.***

# 4.8 Behavior for MEAP Applications

*Time to complete tasks: 5 minutes*

The following steps need to be done for MEAP devices, other instructions are shown below.

1. From the main uniFLOW screen, select ***Connections*** > ***Agents/Terminals.***
2. Expand the group ***MEAP & miniMIND*** and click ***Default Behavior.***




3. For the uniFLOW MEAP Client, select ***Scan Client.***
4. For the uniFLOW Login Manager, select ***Username/Password Type Login***, then click ***Save.***

Please note that the given uniFLOW MEAP Client and uniFLOW Login Manager settings are recommendations only. They can be changed according to given requirements at any time.

# 4.9 Scan Workflow Configuration

This chapter describes the configuration of each scan workflow in detail. Please check the company's planned scan destinations first (**TABLE 3: 1.2 - 1.12**), then proceed with each desired workflow.

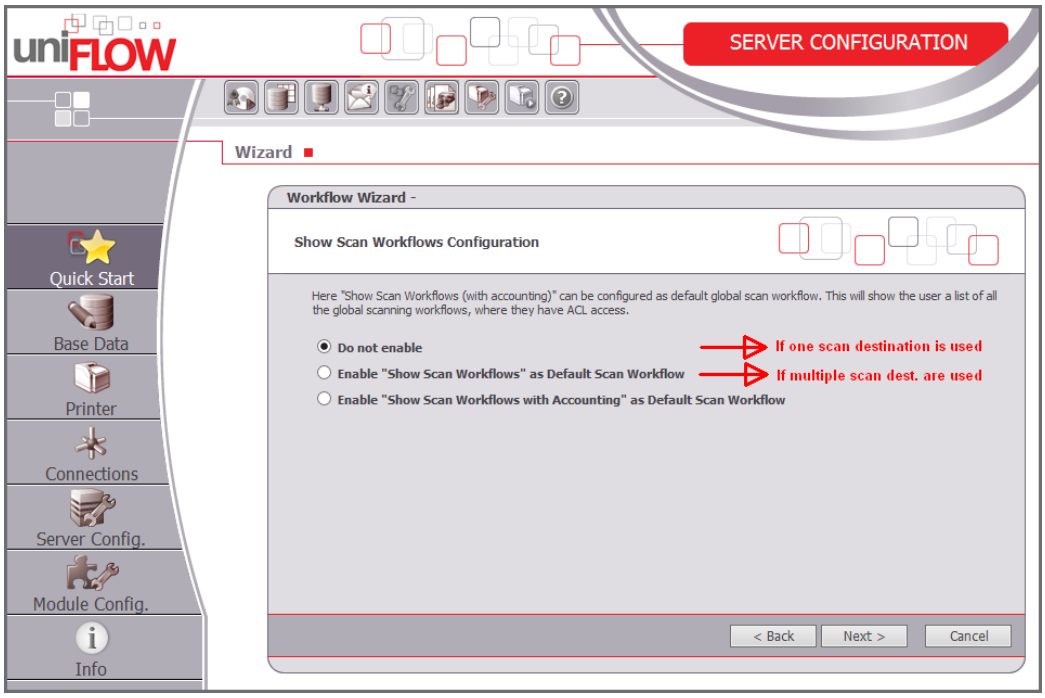
Please note that the Scan Processing Server must be installed prior to performing the following configuration steps. See chapter Scan Processing Server Installation (on page 26).

## 4.9.1 Multiple Scan Destinations

When configuring the first scan workflow (see the corresponding topics below), you will be asked whether to enable "Show Scan Workflows" as Default Scan Workflow.

- In case the company plans to have multiple scan destinations (**Table 3: 1.1 - Multiple Scan Destinations**), choose: ***Enable "Show Scan Workflows" as Default Scan Workflow*** and click ***Next***.
- Otherwise, leave the default setting ***Do not enable*** and click ***Next***.

This screen will only appear when you create your first scan workflow and no other workflow has been created yet.


uniFLOW
SERVER CONFIGURATION
Wizard
Workflow Wizard -
Show Scan Workflows Configuration
Here "Show Scan Workflows (with accounting)" can be configured as default global scan workflow. This will show the user a list of all the global scanning workflows, where they have ACL access.
Do not enable
Enable "Show Scan Workflows" as Default Scan Workflow
Enable "Show Scan Workflows with Accounting" as Default Scan Workflow
If one scan destination is used
If multiple scan dest. are used
Quick Start
Base Data
Printer
Connections
Server Config.
Module Config.
Info
< Back
Next >
Cancel

## 4.9.2 Scan to Box

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration***.
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next***.
4. From the list of wizards, select ***Scan to Box*** and click ***Next***.
5. Click ***Add Identity Type*** and configure the following Identity Type:
   - ***Identity Category: Email Address***
   - ***Identity Type ID:*** *box*
   - ***Identity Type Name:*** *Box*
6. Ensure that the newly created Identity is selected and click ***Next***.
7. Leave the identity warnings and click ***Next***.
8. If the company wants to receive email notification in case of an error (**TABLE 3: 2.1 - Send an Email on Error**), set ***Send an Email on Error*** to ***Yes*** before you click ***Next***.
9. Leave the Scan Job ***Input Configuration*** and click ***Next***.
10. Leave the settings for ***Scan Conversion Configuration*** and click ***Next***.
11. For ***Workflow Name***, enter a name, then click ***Finish***.

## 4.9.3 Scan to Dropbox

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration***.
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next***.
4. From the list of wizards, select ***Scan to Dropbox*** and click ***Next***.
5. Click ***Add Identity Type*** and configure the following Identity Type:
   - ***Identity Category: Email Address***
   - ***Identity Type ID:*** *dropbox*
   - ***Identity Type Name:*** *Dropbox*
6. Ensure that the newly created Identity is selected and click ***Next***.
7. Leave the identity warnings and click ***Next***.
8. If the company wants to receive email notification in case of an error (**TABLE 3: 3.1 - Send an Email on Error**), set ***Send an Email on Error*** to ***Yes*** before you click ***Next***.
9. Leave the Scan Job ***Input Configuration*** and click ***Next***.
10. Leave the settings for ***Scan Conversion Configuration*** and click ***Next***.
11. For ***Workflow Name***, enter a name, then click ***Finish***.

## 4.9.4 Scan to Email

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration.***
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next.***
4. From the list of wizards, select ***Scan to Email*** and click ***Next.***
5. Leave the default ***Workflow Selection Scan to Email*** and click ***Next.***
6. For ***Email Send Method***, leave the setting ***SMTP*** and click ***Next.***
7. For ***Directory***, leave the setting ***uniFLOW Database*** and click ***Next.***
8. Leave the default settings for ***Email Data input*** and click ***Next.***
9. Leave the settings for ***Scan Job Input Configuration*** and click ***Next.***
10. For ***Scan Conversion Configuration***, leave the default settings and click ***Next.***
11. For ***Workflow Name***, enter a name, then click ***Finish.***

## 4.9.5 Scan to Evernote

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration***.
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next***.
4. From the list of wizards, select ***Scan to Evernote*** and click ***Next***.
5. Click ***Add Identity Type*** and configure the following Identity Type:
   - ***Identity Category: Email Address***
   - ***Identity Type ID:*** *evernote*
   - ***Identity Type Name:*** *Evernote*
6. Ensure that the newly created Identity is selected and click ***Next***.
7. Leave the identity warnings and click ***Next***.
8. If the company wants to receive email notification in case of an error (**TABLE 3: 4.1 - Send an Email on Error**), set ***Send an Email on Error*** to ***Yes*** before you click ***Next***.
9. Leave the Scan Job ***Input Configuration*** and click ***Next***.
10. Leave the settings for ***Scan Conversion Configuration*** and click ***Next***.
11. For ***Workflow Name***, enter a name, then click ***Finish***.

## 4.9.6 Scan to Folder

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration.***
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next.***

4. From the list of wizards, select ***Scan to Folder*** and click ***Next.***
5. If the company wants to address user's home folder (**TABLE 3: 5.1 - Scan to User's Home Folder**), enter the details under ***Authentication type***. If required, this information will have been provided by the company IT department in **TABLE 1: 3.4 - SMTP Authentication Server, 3.5 - SMTP Authentication Account, 3.6 - SMTP Authentication Password**.
6. If the company wants to address the user's home folder (**TABLE 3: 5.1 - Scan to User's Home Folder**), ensure that the home folder of each user is configured. In case no home folder is configured, enter the path to the base folder as provided by the company's IT department (**TABLE 3: 5.2 Path to Base Folder**). Afterwards click ***Next***.
7. Leave the settings for ***User Authentication*** and click ***Next***.
8. Leave the settings for ***Scan Job Input Configuration*** and click ***Next***.
9. For ***Scan Conversion Configuration***, leave the default settings and click ***Next***.
10. For ***Workflow Name***, enter a name, then click ***Finish***.

## 4.9.7 Scan to FTP

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration***.
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next***.
4. From the list of wizards, select ***Scan to FTP*** and click ***Next***.
5. Enter the ***FTP Server*** address and ***Base Folder*** (**Table 3: 6.1 - FTP Server address and 6.2 - Base Folder**). Ensure that the settings ***Allow unencrypted communication*** and ***Allow self-signed SSL certificates*** match with **Table 3: 6.3 Allow unencrypted communication and 6.4 - Allow self-signed SSL certificates**. Afterwards click ***Next***.
6. Set the ***Authentication Method*** as provided by the customers IT department and specified on **Table 3: 6.5 - 6.8**. Then, click ***Next***.
7. Leave the ***File Name Configuration*** and click ***Next***.
8. For the ***Scan Job Input Configuration*** leave the default values and click ***Next***.
9. Leave the ***Scan Conversion Configuration*** and click ***Next***.

## 4.9.8 Scan to Google Drive

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration***.
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next***.
4. From the list of wizards, select ***Scan to Google Drive*** and click ***Next***.
5. Click ***Add Identity Type*** and configure the following Identity Type:
   - ***Identity Category: Email Address***

- ***Identity Type ID:*** *google*
- ***Identity Type Name:*** *Google*

6. Ensure that the newly created Identity is selected and click ***Next***.
7. Leave the identity warnings and click ***Next***.
8. If the company wants to receive email notification in case of an error (**TABLE 3: 7.1 - Send an Email on Error**), set ***Send an Email on Error*** to ***Yes*** before you click ***Next***.
9. Leave the Scan Job ***Input Configuration*** and click ***Next***.
10. Leave the settings for ***Scan Conversion Configuration*** and click ***Next***.
11. For ***Workflow Name***, enter a name, then click ***Finish***.

## 4.9.9 Scan to OneDrive

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration***.
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next***.
4. From the list of wizards, select ***Scan to OneDrive*** and click ***Next***.
5. Click ***Add Identity Type*** and configure the following Identity Type:
   - ***Identity Category: Email Address***
   - ***Identity Type ID:*** *onedrive*
   - ***Identity Type Name:*** *OneDrive*
6. Ensure that the newly created Identity is selected and click ***Next***.
7. Leave the identity warnings and click ***Next***.
8. If the company wants to receive email notification in case of an error (**TABLE 3: 8.1 - Send an Email on Error**), set ***Send an Email on Error*** to ***Yes*** before you click ***Next***.
9. Leave the Scan Job ***Input Configuration*** and click ***Next***.
10. Leave the settings for ***Scan Conversion Configuration*** and click ***Next***.
11. For ***Workflow Name***, enter a name, then click ***Finish***.

## 4.9.10 Scan to SharePoint

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration***.
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next***.
4. From the list of wizards, select ***Scan to SharePoint*** and click ***Next***.
5. Enter the ***SharePoint Server Configuration*** as provided via the customer IT department (**TABLE 3: 9.1 SharePoint Server Address, 9.2 Protocol and 9.3 Allow self-signed SSL certificates**). Afterwards click ***Next***.

6. Select whether to ***Show SharePoint Sites*** (**Table 3: 9.4 - Show SharePoint Site**) and enter the ***SharePoint Service Account Name*** (**Table 3: 9.5 - SharePoint Service Account**) if different from the current one. Afterwards click ***Next***.
7. Leave the default setting for the ***SharePoint Space Configuration*** and click ***Next***.
8. Leave the default ***SharePoint Properties*** and click ***Next***.
9. If the company wants to receive email notification in case of an error (**TABLE 3: 9.6 - Email notification on error**), set ***Email notification on error*** to ***Yes*** before you click ***Next***.
10. Leave the default setting for ***Email notification on success***. Then, click ***Next***.
11. Leave the Scan Job ***Input Configuration*** and click ***Next***.
12. Leave the settings for ***Scan Conversion Configuration*** and click ***Next***.
13. For ***Workflow Name***, enter a name, then click ***Finish***.

## 4.9.11 Scan to WebDAV

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration***.
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next***.
4. From the list of wizards, select ***Scan to WebDAV*** and click ***Next***.
5. Enter the ***WebDAV Server Configuration*** as provided from the customer IT department (**TABLE 10: 10.1 - WEBDAV Server IP or DNS Name; 10.2 WebDAV URL; 10.3 - Allow user folder navigation; 10.4 Protocol**). Afterwards click ***Next***.
6. Specify the ***Identity type to browse folders*** (T**ABLE 10: 10.6: Identity type to browse folders**), ***Identity type to send file*** (**TABLE 10: 10.7: Identity type to send file**) and specify if the user's credentials shall be checked and requested (**TABLE 10: 10.5 Get User Authentication**). Then, click ***Next***.
7. Leave the Scan Job ***Input Configuration*** and click ***Next***.
8. Leave the settings for ***Scan Conversion Configuration*** and click ***Next***.
9. For ***Workflow Name***, enter a name, then click ***Finish***.

## 4.9.12 Scan to Myself

*Time to complete tasks: 5 minutes*

1. From the ***Quick Start*** screen, select ***Scan Configuration.***
2. Click on the ***New*** icon on the top right hand side of the screen.
3. Select ***Scanning*** and click ***Next.***
4. From the list of wizards, select ***Scan to Email*** and click ***Next.***
5. Change the ***Workflow Selection*** to ***Scan to Myself*** and click ***Next.***
6. For ***Email Send Method***, leave the setting ***SMTP*** and click ***Next.***

7. For ***Directory***, leave the setting ***uniFLOW Database*** and click ***Next.***
8. Leave the default settings for ***Email Data input*** and click ***Next.***
9. Leave the settings for ***Scan Job Input Configuration*** and click ***Next.***
10. For ***Scan Conversion Configuration***, leave the default settings and click ***Next.***
11. For ***Workflow Name***, enter a name, then click ***Finish.***

# Index

**A**

Activation ..... 16

**B**

Before You Start ..... 5

Behavior for MEAP Applications ..... 28

**C**

Configuration ..... 15

**D**

Disclaimer ..... 3

**E**

Email Server Configuration ..... 23

**G**

General Settings Configuration ..... 24

**H**

Hardware ..... 10

**I**

Index ..... 37

Information Required from the Customer ..... 2

Installation ..... 11

**M**

MEAP Applet Installation ..... 14

Multiple Scan Destinations ..... 29

**O**

Operating Systems ..... 8

**P**

Preparation ..... 1

Price Profiles Configuration ..... 25

**S**

Scan Device Creation ..... 27

Scan Processing Server Installation ..... 26

Scan to Box ..... 30

Scan to Dropbox ..... 30

Scan to Email ..... 31

Scan to Evernote ..... 31

Scan to Folder ..... 31

Scan to FTP ..... 32

Scan to Google Drive ..... 32

Scan to Myself ..... 34

Scan to OneDrive ..... 33

Scan to SharePoint ..... 33

Scan to WebDAV ..... 34

Scan Workflow Configuration ..... 29

Symbols ..... 5

System Requirements ..... 7

**U**

uniFLOW Installation ..... 12

User Configuration ..... 20

© NT-ware 2009-2015